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ABSTRACT

The Southern Institute on Children and Families is an independent, nonprofit public policy organization founded in 1990 to improve opportunities for children and families in the South with a focus on disadvantaged children. This annual report presents the accomplishments and activities of the organization for 2000. The report begins with introductory letters from the chairman and from the president discussing the organization's mission. Background information is provided, including a timeline of the organization's major accomplishments over the 10 years since its inception. The report continues with information on the background and progress of the following initiatives: (1) "Covering Kids," a health access initiative for low-income uninsured children; (2) the "Southern Regional Initiative on Child Care," improving access to affordable child care; and (3) "Supporting Families After Welfare Reform," improving access to Medicaid, state health insurance programs, and food stamps. Also described are new initiatives for improving transportation services in rural areas, improving the environment of local service eligibility offices, and enlisting the support of business partners for their mission. The report also includes a list of 2000 publications of the Southern Institute. The report concludes with a list of the board of directors and Institute staff. The report's appendix summarizes the institute's accomplishments over the past 10 years. (KB)

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THE SOUTHERN INSTITUTE

Sarah C. Shuptrine and Kristine Hartvigsen

10 Years Aloft!

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The Southern Institute on Children and Families

The Southern Institute on Children and Families is an independent, non-profit public policy organization founded in 1990. It endeavors to improve opportunities for children and families in the South with a focus on disadvantaged children. Through special projects and surveys, the Southern Institute on Children and Families spotlights health, social and economic issues of regional significance. It works to encourage public/private-sector collaboration on behalf of children and families and seeks to remove bureaucratic and other barriers that restrict access to needed services. The Southern Institute on Children and Families is funded through grants and contributions. The southern states included in the work of the Southern Institute on Children and Families are:

Alabama
Arkansas
Delaware
District of Columbia
Florida
Georgia
Kentucky
Louisiana
Maryland
Mississippi
Missouri
North Carolina
Oklahoma
South Carolina
Tennessee
Texas
Virginia
West Virginia

While the primary focus of the Southern Institute on Children and Families is on the South, the Southern Institute directs national programs related to its mission.

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Southern Institute on Children and Families

2000 Annual Report

Letter from the Chairman

In the decade since the Southern Institute on Children and Families was created, we have been guided by a strong sense of mission. Our founder, President and CEO, Sarah Cardwell Shuptrine, has provided remarkable leadership as we moved forward.

When our first chairman, Richard W. Riley, ascended to the two-term cabinet position of U.S. Secretary of Education in 1993, I was honored to be elected chairman of the Board of Directors for the Southern Institute. For me, these years have been filled with meaning and satisfaction upon seeing the results we have achieved on behalf of children and families.

The Southern Institute has conducted studies and distributed cutting-edge reports shedding considerable light on barriers that have restricted access to benefits needed by low-income families. Many of these benefits are essential to meet the health and economic needs of children and families. Improving access to benefits such as Medicaid and SCHIP, the Earned Income Tax Credit, child care assistance, Food Stamps and transportation is a critical work-support strategy that can make it possible for families to avoid welfare. The Southern Institute's studies have led to significant steps being taken across the nation to reduce eligibility barriers and to develop attractive informational materials that effectively communicated with families about available benefits. The point that families do not have to be on welfare to receive substantial assistance has been a primary message.

I hail from a small town – Mayersville, Mississippi. As Mayor there, I've sat down to dinner with my constituents. I've held their babies. I've listened to their problems and tried to help. The issues facing families with lower incomes are pervasive, and the Southern Institute is determined to bring them to the forefront of public policy. Just as families in my town and across the country struggle daily to overcome obstacles, the Southern Institute continues to press on, every day, with its efforts to facilitate — through policy analysis, education and outreach — more informed leadership and greater success in improving opportunities for children in our region and across the country.

I am proud to be part of this organization and am exceedingly grateful to the foundations, states and individuals that have provided support for its work over the past decade.

Unita Blackwell
Chairman

Letter from the President & CEO

From the beginning, the Southern Institute on Children and Families was a hard sell. There was no precedent for the Southern Institute, no model to pattern ourselves after. In addition, our vision was difficult for many to grasp. This presented a formidable challenge with regard to persuading others to invest in our work, which continues to blaze trails on the public policy front.

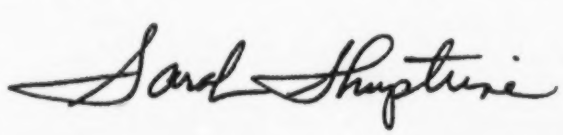
We knew a regional public policy organization could make a tremendous difference in bringing about more informed public decision-making and thus positively affect the lives of disadvantaged children and families in the South. We also believed that our work could lead to more progressive public policies at the federal level and across many other states.

Ten years and dozens of major public policy initiatives later, I can say with confidence that the Southern Institute is meeting head-on the challenges set forth in its mission statement — to improve opportunities for children and families in the South with a focus on disadvantaged children. And we are very pleased that our work has contributed beyond our region to more enlightened public policies and implementation strategies in programs designed to help children and families. The Southern Institute has held firm to its high standards for excellence and integrity. These non-negotiable qualities remain as true and steadfast as that first day we opened our doors. Much credit goes to our dedicated board and to our talented staff, but without consistent funding, many projects never would see the light of day or come to benefit the children and families we strive to help.

Over the past decade, the Southern Institute has received most of its financial support from foundations. Among them are The Robert Wood Johnson Foundation, The David and Lucile Packard Foundation, The Foundation for Child Development, The Henry J. Kaiser Family Foundation, the Smith Richardson Foundation and the Central Carolina Community Foundation. In addition, policy studies and outreach initiatives have been supported through singular contracts with southern states, including Florida, Georgia, North Carolina and Tennessee. The Southern Institute also has received contributions from a variety of individual private donors. To all of these funding partners, we offer our sincere and gracious thanks. Your support has helped us make significant progress toward our mission.

Also, special appreciation goes to public and private groups throughout the South and across the country for their willingness to participate in the many collaborative opportunities initiated by the Southern Institute.

As President and CEO, I pledge to all those organizations and individuals who have supported the Southern Institute — and to all the families on whose behalf our efforts are focused — that we will continue to forge ahead to make the future brighter for children and families.



Sarah C. Shuptrine
President and CEO

Southern Institute on Children and Families

2000 Annual Report

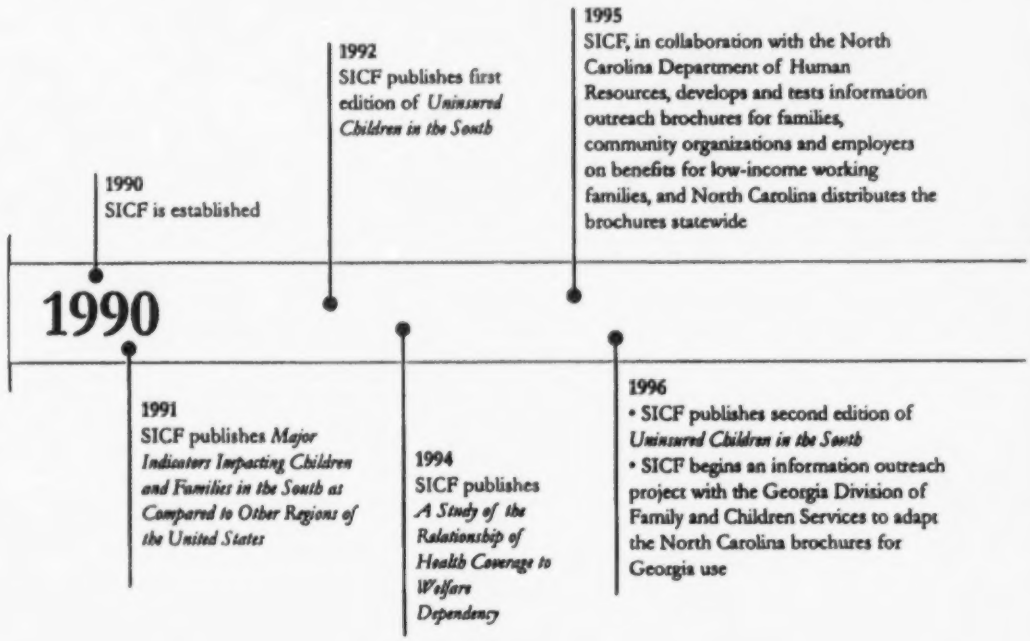
Lofty. That's what many people called our goals when we first hung out our non-profit shingle as the Southern Institute on Children and Families.

Back then, we were a staff of three operating out of a small office located in a sleepy, tree-lined neighborhood. There was no doubt in our minds that we were going to bring about more progressive public policies to address the needs of disadvantaged children and families in the South and that our efforts would resonate beyond our region.

Sure, you could call us dreamers. But in 10 years, the Southern Institute indeed has contributed significantly to the betterment of public policies that affect children and families — by patiently yet persistently pursuing improvements in the way government benefit programs were designed by policy and implemented in reality.

Our vision was that of a society that placed value on assisting families with limited means in meeting the basic needs of their children. We remain convinced that solid information and informed leadership lead to action. Our collaboration initiatives involving diverse public and private sector organizations have demonstrated the value of partnerships that foster dialogue on complicated public policy issues affecting children and families.

The Southern Institute placed an initial priority on improving access to public child health coverage through reform of policies and procedural requirements for enrollment — an area where we had earned a national reputation. We provided regional and national leadership to improve


1990
SICF is established
1991
SICF publishes *Major Indicators Impacting Children and Families in the South as Compared to Other Regions of the United States*
1992
SICF publishes first edition of *Uninsured Children in the South*
1994
SICF publishes *A Study of the Relationship of Health Coverage to Welfare Dependency*
1995
SICF, in collaboration with the North Carolina Department of Human Resources, develops and tests information outreach brochures for families, community organizations and employers on benefits for low-income working families, and North Carolina distributes the brochures statewide
1996
• SICF publishes second edition of *Uninsured Children in the South*
• SICF begins an information outreach project with the Georgia Division of Family and Children Services to adapt the North Carolina brochures for Georgia use

Background and Introduction

communications with families who apply for and receive public benefits such as health coverage, child care subsidies, the Earned Income Tax Credit and Food Stamps.

The Southern Institute produced the first comprehensive information outreach materials and videos on an array of benefits for low-income families. We established public/private partnerships and brought about dialogue across agency lines and federal/state lines on these and other essential supports needed by families who work at low wages. We included employers in our communication initiatives.

The Southern Institute also spotlighted unmet needs such as transportation, child care, health care and educational opportunities, all of which are essential ingredients in a family's ability to work.

Throughout our efforts, we spoke of the need to treat families with dignity and respect.

We provide the following visual journey through the past 10 years to outline our initiatives and to pay tribute to the foundations, states and individuals who have supported our work. A full chronology of the Southern Institute's activities appears in the Appendix to this report.

At the end of 2000, the Southern Institute is poised to continue reaching for the sky into the new millennium on behalf of low-income children and families. This is our *2000 Annual Report*, and it is our pleasure over the following pages to guide you through our history up to our most recent endeavors.

1997
- SICF conducts site visits to 17 southern states and the District of Columbia and publishes *Southern Regional Initiative to Improve Access to Benefits for Low-Income Families with Children*
- SICF is named the National Program Office for *Covering Kids: A National Health Access Initiative for Low-Income, Uninsured Children*
- Florida and Tennessee replicate the SICF information outreach brochures

1998
- SICF continues to serve as the *Covering Kids* National Program Office
- *Covering Kids* is expanded to a $47 million nationwide program
- SICF information outreach brochures are replicated in an additional 12 states: Alabama, Arkansas, Delaware, Kentucky, Maryland, Mississippi, Missouri, Oklahoma, South Carolina, Texas, Virginia and West Virginia

1999
- SICF continues to serve as the *Covering Kids* National Program Office; projects are funded in 49 states, the District of Columbia, and 167 communities
- SICF is designated as the National Program Office for *Supporting Families After Welfare Reform*
- Louisiana replicates SICF outreach brochures
- SICF outreach brochures are produced in Spanish
- SICF publishes *Meyersville, Mississippi: A Study on Improving Access to Benefits and Services for Low-Income Families in the Rural South*

2000

2000
- SICF continues to serve as the National Program Office for *Covering Kids* and *Supporting Families After Welfare Reform*
- SICF establishes the Southern Regional Task Force on Child Care
- SICF publishes the *Sound Investments* child care report and *Action Plan for the South*

Covering Kids

Southern Institute on Children and Families

2000 Annual Report

Background

Since 1997, the Southern Institute has served as the National Program Office (NPO) for *Covering Kids: A National Health Access Initiative for Low-Income, Uninsured Children.* The three-year, $47 million initiative was established by The Robert Wood Johnson Foundation to help states and local communities increase the number of eligible children enrolled in health insurance programs.

By 2000, the initiative had projects in 50 states and the District of Columbia, as well as pilot projects in more than 170 local communities. As the *Covering Kids* NPO, the role of the Southern Institute is to provide support and assistance to statewide coalitions in achieving three specific goals:

- Design and conduct outreach programs that identify and enroll eligible children into Medicaid and other coverage programs;
- Simplify enrollment processes; and
- Coordinate existing coverage programs for low-income children.

The *Covering Kids* initiative created national momentum to reform eligibility policies and procedures and to conduct aggressive outreach to low-income families whose children were eligible for Medicaid and the State Children's Health Insurance Program (SCHIP). Public- and private-sector collaboration is being achieved through *Covering Kids* coalitions that focus on the outreach, simplification and coordination goals. Their collaborative efforts have contributed in a significant way to a major shift toward making eligibility for Medicaid and SCHIP more accessible to uninsured children across the country.

Progress in 2000

During 2000, the Southern Institute monitored *Covering Kids* statewide projects and provided guidance to coalitions. Primary hallmarks of *Covering Kids* have been the sharing of information, the promotion of dialogue on identified issues and the development of strategies to improve access to child health coverage. The 2000 agenda created numerous opportunities to facilitate discussion and action.

Covering Kids convened three regional meetings during 2000 for grantees and state officials, one each in Savannah, Georgia, in Albuquerque, New Mexico, and in Philadelphia, Pennsylvania. The meetings were designed to provide grantees an opportunity to learn about the issues and about strategies they can employ to achieve the three *Covering Kids* goals. The regional meetings allowed grantees to strengthen relationships not only with one another but with the invited state and federal officials in attendance as well. Each regional meeting included a special technical assistance session on state application and redetermination forms and notices, in which each state's delegation received formal, individual feedback and expert recommendations on how to simplify application and renewal forms and notices.

In March 2000, *Covering Kids* convened an informal discussion session with national groups on issues related to enrolling eligible children from immigrant families in Medicaid and

SCHIP. Approximately 25 representatives from the public and private sector attended the meeting, held in Washington, DC. The meeting provided a forum for information-sharing and discussion of ideas on problem areas and opportunities, as well as facilitated dialogue on issues that restrict access for citizen children in immigrant families.

In April 2000, the Southern Institute conducted a National Conference titled "Getting the Job Done: Insuring Eligible Children" in Washington, DC. The conference brought together more than 150 *Covering Kids* state project staff, state and national policy staff, as well as consultants and federal agency officials, to deliberate children's health coverage issues that require state and federal attention. The National Conference focused on several issues that had been discussed for many years without strategies being implemented to address them, including the impact of federal/state quality assurance measures on access to child health coverage and interstate barriers affecting health coverage for children in migrant families.

In the spring of 2000, The Robert Wood Johnson Foundation contracted with Greer Margolis Mitchell Burns & Associates (GMMB&A), a communications firm based in Washington, DC, to help implement an ambitious plan for *Covering Kids* communications, marketing, research, advertising and outreach activities. Throughout the year, the Southern Institute worked closely with GMMB&A and the Foundation on research and messaging strategies that culminated in a national back-to-school launch for *Covering Kids* in August 2000. With up to $26 million allocated over three years, the communications initiative includes the development of television, radio and opinion leader print advertisements and broadcast Public Service Announcements (PSAs), as well as the test marketing of TV spots in six selected U.S. cities.

The August 9 launch of the public education campaign was held in Washington, DC. Speakers at the news conference included Health and Human Services Secretary Donna Shalala, Education Secretary Richard Riley, The Robert Wood Johnson Foundation President and CEO Stephen Schroeder, and *Covering Kids* National Program Office Director and Southern Institute President Sarah Shuptrine. At the news conference, *Covering Kids* released results of research indicating, among other findings, that six out of 10 parents with uninsured children who qualify for Medicaid or SCHIP do not believe these programs apply to them.

The 2000 Back-to-School *Covering Kids* launch event and campaign generated 165 television news stories, more than 15,000 radio stories and 497 newspaper articles. The *Covering Kids* story appeared on the front page of at least 45 newspapers, and at least 20 newspapers published editorials supporting the outreach effort. All of this coverage combined reached an estimated 78 million people nationwide.

The *Covering Kids* Communications and Marketing Strategies Group established by the Southern Institute in 1998 continued its activities, holding meetings in March and September 2000. Since its inception, this group has provided a needed forum for information-sharing, relationship-building and communication on the various child health coverage public education activities undertaken by national advocacy groups, national provider groups and the federal government. At the September 2000 meeting, the Southern Institute initiated activities to transfer primary responsibility for this communications initiative to GMMB&A.

To better prepare *Covering Kids* statewide and local grantees to conduct effective outreach, the Southern Institute secured specialized technical assistance through a consultant contract with the Center on Budget and Policy Priorities (CBPP). Outreach through the National School Lunch Program received special attention. The Southern Institute commissioned

CBPP to conduct a 50-state survey of food service directors, compile information and analyze results for publication in early 2001.

The *Covering Kids* Second Annual Meeting was held in September 2000 in Nashville, Tennessee. The Southern Institute made special efforts to involve statewide and local *Covering Kids* representatives as presenters and facilitators. During the *Covering Kids* Annual Meeting, the U.S. Census Bureau released a report of its annual Current Population Survey (CPS) data. The timely report indicated that from 1998 to 1999, the number of uninsured children in the United States declined by 1.5 million.

Also in the fall of 2000, The Robert Wood Johnson Foundation made funds available to redesign the national *Covering Kids* website, located at http://www.coveringkids.org. Primary objectives for this redesign include site search capabilities and navigation aids, accommodation for online meeting registration, materials ordering — and most important — an engaging, database-driven infrastructure to facilitate the efficient provision of more accurate and timely information. The new website will be launched in June 2001.

Looking Ahead

2001 represents the sunset of the active grant period for 21 *Covering Kids* projects. As these and other *Covering Kids* coalitions contemplate their long-term sustainability and direction for the future, they are reviewing lessons learned over the past three years in order to develop strategies for the future.

Covering Kids coalitions across the country have made strides in increasing the enrollment of eligible children in Medicaid and the State Children's Health Insurance Program (SCHIP). But as children are coming in the front door, many are leaving out the back. Children often are lost out the back door not because their families' circumstances change so dramatically as to make them ineligible but because their families failed to produce required documents or to otherwise meet procedural requirements — the same issues that posed barriers to initial enrollment.

Retention also becomes a significant issue with regard to families leaving welfare for work. Half of all children leaving Temporary Assistance for Needy Families (TANF, formerly known as welfare or cash assistance) were not receiving Medicaid after leaving TANF, even though most qualified for either Medicaid or SCHIP. Since the programs were de-linked under welfare reform legislation in 1996, enrollment and renewal no longer are automatic for TANF recipients. Many families mistakenly believe that Medicaid still is connected with TANF, and that when they stop receiving TANF, they are no longer eligible for Medicaid coverage. This reinforces the importance the Southern Institute has placed on information outreach to families while they still are receiving TANF benefits so they are aware that health coverage is available outside of the welfare system.

Covering Kids in 2001 will devote special attention to retaining eligible children in Medicaid and SCHIP. In addition to achieving stability of child health coverage, attention to renewal will address administrative efficiency. Because re-enrollment after case closure places a greater administrative burden on the state than does renewal, arguments for improved retention strategies make sense from both administrative and continuity-of-coverage perspectives.

Southern Regional Initiative on Child Care

Background

Never before has there been a more compelling need in our country to enact progressive child care financial aid policies. With millions of parents working at the lower end of the wage scale, many of them leaving the welfare rolls, assistance in paying for child care is perhaps the most critical work-support measure in which the federal government, states and the private sector can invest.

The inability of many families to pay for child care is a public policy issue with far-reaching consequences for southern states. To develop and maintain the workforce required to fuel economic progress throughout the South, greater investments in strategies that make child care more accessible and affordable are essential. To sustain the ability of families to stay off the welfare rolls, financial assistance in paying for child care is imperative. To assure that all children have greater opportunities to participate in early childhood development programs that enhance their readiness to learn, helping families afford quality services is basic. Yet, there is inadequate attention given to the huge gap between the price of child care and the ability of families to pay.

Child care is expensive, on average comprising the third largest expense for all families with preschool-age children, after housing and food. In each of the 17 southern states and the District of Columbia, the annual cost of enrolling a four-year-old in a full-time child care center exceeded the cost of annual state university tuition. The expense of child care disproportionately impacts lower-income families, who pay a much higher percentage of their income for child care than middle-income or upper-income families.

In late 1999, the Southern Institute received a grant from The David and Lucile Packard Foundation to lead the Southern Regional Initiative on Child Care. At the invitation of the Southern Institute, governors from 16 southern states and the mayor of the District of Columbia appointed representatives to the Southern Regional Task Force on Child Care. Additional appointments were made by the Southern Institute and by the Southern Growth Policies Board. The charge to the Task Force was to collaborate in the identification of issues and the development of an action plan to improve access to child care assistance for low-income families in the southern region.

Progress in 2000

During its deliberations in 2000, the Task Force received testimony from professionals, families and representatives of the business community, and identified barriers that impede access to child care assistance for low-income families.

In early 2000, the Southern Institute commissioned the development of a paper outlining the critical role of child care financial assistance in supporting low-income working families and as a key economic development strategy for states. The paper, titled *Child Care in the Southern States: Expanding Access to Affordable Care for Low-Income Families and Fostering Economic Development*, was published and widely distributed in April 2000.

The Southern Institute also commissioned a survey of the southern states to collect detailed information on the state/federal child care subsidy system policies and procedures in each state. In-depth discussions, testimony and survey data all contributed to the identification of issues and opportunities. The Task Force identified the following issues as barriers to child care financial assistance:

- significant underfunding of the public child care subsidy system;
- eligibility policies and systems that hinder access to public child care subsidies;
- inadequate attention to developing employer child care assistance partnerships; and
- lack of federal and state tax strategies, e.g., refundable child care and dependent tax credits.

Based on this work, the Task Force in December 2000 published both a comprehensive report, titled *Sound Investments: Financial Support for Child Care Builds Workforce Capacity and Promotes School Readiness,* and a companion booklet, *Action Plan for the South.* The full report was released at a December news conference in Washington, DC. The press conference generated media coverage across the southern states and beyond. In total, the event garnered more than 100 newspaper articles as well as television and radio coverage that resulted in dozens of stories. The TV coverage included segments on NBC, ABC, CBS and FOX affiliates, as well as on CNN *Headline News.*

Looking Ahead

Beginning in January 2001, the Task Force focus will be on implementation of the Action Plan set forth in *Sound Investments*, and the Task Force will initiate work to address additional issues associated with improving access to quality child care. The continuation of the initiative is supported by an additional two-year grant from The David and Lucile Packard Foundation.

Central to the implementation plan will be site visits to each of the 16 participating southern states and the District of Columbia, where briefing sessions will promote awareness and action. After a review of the Action Plan, site visit participants will engage in a discussion to identify opportunities and barriers to achieving the goals and action steps.

Throughout 2001, the Southern Institute will enlist regional and national expertise to conduct research and provide technical assistance to help states address the Action Plan goals. Print and audiovisual materials will be developed to assist public and private organizations as they work to achieve action on the goals and action steps.

In June 2001, the Southern Institute will conduct a second survey of the 16 southern states and the District of Columbia to determine the status of efforts to implement the Action Plan. Findings of the Southern Institute survey will be compiled into a report, and the results will be utilized in developing an agenda for the Southern Regional Forum on Child Care to be held in October 2001. The Forum agenda will spotlight success stories that have replication potential and also will stimulate dialogue on issues that have impeded implementation of the Action Plan. A December 2001 report will outline the results of the second year of the Southern Regional Initiative on Child Care and specify actions that remain to be taken.

Working together through the Southern Regional Initiative on Child Care, southern states will maintain a strong commitment to seek greater investments in helping low-income families obtain access to affordable, quality child care. Through sustained attention, this public-private collaboration will facilitate sound decision-making, and the results will contribute to a more stable and productive workforce, reduced welfare dependency and improved school performance.

Supporting Families After Welfare Reform

Background

In recent years, numerous data sources have shown significant enrollment declines in the Medicaid and Food Stamp programs. The declines may, in part, be related to welfare policy changes.

Families leaving welfare still may be eligible for health care coverage but have their Medicaid cases closed without a determination as to whether or not they remain Medicaid-eligible. Much of this is an unintended consequence of breaking the link in eligibility between the welfare and Medicaid programs. Technical problems such as coordination across state information systems and between state and county offices administering public programs contribute to the failure to enroll and retain eligible adults and children in health coverage programs.

In addition, it is likely that many families leaving welfare remain eligible for the Food Stamp program. And while reducing dependence on government benefits is a goal of welfare reform, a parallel goal is helping parents sustain their ability to provide for their families. Participation in the Medicaid and Food Stamp programs can help increase a family's ability to make and sustain the transition to self-sufficiency, as well as provide important benefits for the health and well-being of each family member, particularly children.

In 1999, The Robert Wood Johnson Foundation (RWJF) tapped the Southern Institute to serve as the National Program Office (NPO) for *Supporting Families After Welfare Reform: Access to Medicaid, SCHIP and Food Stamps*, a new $6.8 million initiative collaboratively funded by the Foundation, the U.S. Department of Health and Human Services (DHHS) and the U.S. Department of Agriculture (USDA). The program's purpose is to help states and large counties solve problems in eligibility processes that make it difficult for low-income families to access and retain Medicaid, SCHIP or Food Stamps — particularly families moving from welfare to work.

Two kinds of grants were defined for the program. Diagnosis grants would help projects extract performance reports from state and county eligibility information systems, as well as identify key measures of effectiveness in enrolling and retaining families. Implementation grants would help projects implement strong plans to solve enrollment and retention problems.

Progress in 2000

The Foundation issued a Call For Proposals (CFP) in February 2000, with applications due to the Southern Institute by May 1. *Supporting Families* application workshops were offered in conjunction with *Covering Kids* Regional Meetings in Savannah (GA), Albuquerque (NM) and Philadelphia (PA). In addition, the Southern Institute held an Application Conference Call in March.

The Southern Institute received a total of 19 applications from 18 states and one large county. The applications were screened for completeness and compliance with the CFP and

then were distributed to members of the *Supporting Families* National Advisory Committee (NAC) for recommendations. Between July and November, representatives from the NAC, The Robert Wood Johnson Foundation and the Southern Institute conducted 11 pre-award site visits. Ultimately, nine grants were awarded in Alabama, Connecticut, Delaware, Georgia, Maine, Minnesota, New Jersey, Cuyahoga County (Ohio), and South Carolina.

During 2000, a major responsibility of the Southern Institute as the *Supporting Families* NPO has been the development of content for training workshops to address barriers to participation and improvements in eligibility processes. To assist in this process, the Southern Institute contracted with Mid-America Consulting Group (which since has been renamed MCGiX).

Policy experts were invited to attend two work group meetings facilitated by MCGiX in July and August 2000. Using information derived from the work group meetings, MCGiX worked with the Southern Institute to develop two training instruments for grantees: *The Program Diagnostic Tool* and the *Tool Kit for State Policy Writers and Decision-Makers*. The first provided a logical process for diagnosis of problems in eligibility programs that would lead grantees through the problem-solving process. The second served as a policy/procedural resource by providing federal policies and information on points within eligibility systems where there is the risk of losing eligible recipients. In addition to hard copies in binder form, the materials were made available on CD-ROM. A third document also was developed for use by technical assistance consultants in leading grantees through a diagnostic process.

Looking Ahead

During 2001, *Supporting Families* will sponsor two intensive training sessions. Grantees will be asked to send representatives from their state Medicaid, Temporary Assistance to Needy Families (TANF), Food Stamp and Information Systems divisions to participate. This collaborative training opportunity will set the groundwork for the extensive teamwork essential to achieve the *Supporting Families* goals.

Each Diagnosis grantee will receive three site visits by consulting teams assigned by the Southern Institute. Implementation grantees will receive on-site technical assistance visits during the latter part of 2001.

The first *Supporting Families* Annual Meeting is planned for November 2001 to provide grantees with the opportunity to network and share experiences with one another and to hear from experts in policy and information systems.

On the Horizon

In looking to the future, the Southern Institute will stay the course begun back in 1990 by continuing its important work on improving access to available benefits, including health coverage and child care assistance for low-income families. Sustained attention will be needed to translate actions in the policy arena into real-life improvements in the ability of low-income families to access crucial work-support benefits and achieve greater self-sufficiency. The Southern Institute also will begin to address additional issues that affect the well-being of children and families.

New Initiatives

Over the next several years, the Southern Institute will pursue support to work in areas where research has shown deficiencies in funding, policy or leadership.

Transportation consistently is identified as a barrier to accessing health care and other services, especially in rural areas. It also has been singled out as a major impediment to gaining and sustaining employment both for families leaving welfare and for other low-income working families. Yet there is little attention being given to the need for collaboration around solutions. The Southern Institute will seek support to help southern states develop strategies to overcome transportation barriers.

Over the past few years, multiple research sources have confirmed what families have told the Southern Institute throughout the '90s — that going to the local eligibility office can be a demeaning and discouraging experience. Likewise, we have worked with state and local eligibility staff to identify issues from their perspective. The Southern Institute will seek support to improve the environment of local offices, both for families and staff.

In addition, it is our hope to secure support to educate and partner with businesses on commonsense approaches that will facilitate improvements in public policies and enlist employers as conduits of information about available benefits for low-income working families. An informed business community can make a significant difference in moving the public sector toward the development of more progressive policies on behalf of low-income families. Astute employers know the bottom-line benefit of public programs is that they help low-income employees pay for the high cost of child health coverage, child care, food, transportation and other basic necessities. These benefits supplement wages at no cost to employers and positively impact workforce capacity. Only through business and corporate leadership will we expand on the groundwork we've already established and broaden support for public policies that reward work and help parents avoid welfare.

In 10 years, our mission has remained unchanged — to improve opportunities for children and families in the South with a focus on disadvantaged children. It is our pledge and promise to continue working diligently to remove barriers so that families have access to the opportunities and benefits they need to prosper.

Institute Publications

The Southern Institute published and disseminated five reports during 2000, both in physical form and electronically on its internet websites located at http://www.kidsouth.org/reports.html and at http://www.coveringkids.org/technical.html.

Child Care Assistance

Child Care in the Southern States: Expanding Access to Affordable Care for Low-Income Families and Fostering Economic Development, prepared for the Southern Regional Initiative on Child Care by Louise Stoney of Stoney Associates, Southern Institute on Children and Families, April 2000.

Sound Investments: Financial Support for Child Care Builds Workforce Capacity and Promotes School Readiness, a report of the Southern Regional Task Force on Child Care, Southern Institute on Children and Families, December 2000.

Action Plan to Improve Access to Child Care Assistance for Low-Income Families in the South, a report of the Southern Regional Task Force on Child Care, Southern Institute on Children and Families, December 2000.

Child Health Coverage

Fostering A Close Connection: Report to Covering Kids on Options for Conducting Child Health Insurance Outreach and Enrollment Through the National School Lunch Program, prepared for *Covering Kids* by Donna Cohen Ross of the Center on Budget and Policy Priorities, Southern Institute on Children and Families, January 2000.

Stigma: A Paper for Discussion, prepared for *Covering Kids* by Barbara Matacera Barr of The Robert Wood Johnson Foundation, Southern Institute on Children and Families, February 2000.

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Report Appendix

The Southern Institute on Children and Families is established.	1990
The Southern Institute releases a report at the National Press Club in Washington, DC, outlining the conditions that place children at risk in the southern region. The report is titled *Major Indicators Impacting Children and Families in the South as Compared to Other Regions of the United States.*	1991
The Southern Institute receives a grant from The Henry J. Kaiser Family Foundation to collect and analyze information on uninsured children in 17 southern states and the District of Columbia, and releases its report, titled *Uninsured Children in the South,* at a news conference in Atlanta, Georgia. The report spotlights the region with the highest proportion of uninsured children and is widely covered by news organizations, resulting in 190 articles published in 32 states. Coverage includes information carried on CNN's *Headline News* channel. (Extensive demand necessitates a second printing in 1993.)	1992
The Southern Institute conducts a National Library of Medicine outreach project targeting professionals working in maternal and child health and establishing linkages with policymakers. Public/private-sector dialogue sessions are held in six southern states, and a report is published in November 1993, titled *Creating Opportunities in the South to Link Maternal and Child Health Professionals and the National Library of Medicine.* The report discusses the awareness brought about through the Southern Institute state dialogue sessions that provided information on computer resources to help rural health practitioners be less isolated professionally by having electronic access to the latest medical literature.	1992-93
The Southern Institute conducts a study on the relationship of health coverage to welfare dependency. Extensive one-on-one interviews are conducted with families receiving AFDC (cash assistance) and families receiving Transitional Medicaid in North Carolina and Tennessee. The study results in a March 1994 report titled *A Study of the Relationship of Health Coverage to Welfare Dependency.* The landmark report documents the lack of information and widespread misperceptions about benefits available to low-income families as barriers to families leaving welfare for work. (Extensive demand necessitates a second printing.)	1993-94
The Southern Institute continues its work with the National Library of Medicine to define implementation strategies for several of the recommendations contained in the November 1993 report.	1994
The Southern Institute participates in an 18-month collaboration with the North Carolina Department of Human Resources (DHR) to address findings from the March 1994 welfare dependency report. Eighteen focus groups are convened to test three information outreach brochures communicating uncomplicated messages about major benefits for low-income families. The brochures — titled: *Have You Heard About Benefits for Working Families???, Leaving Welfare for Work Isn't As Scary As It Seems,* and *Facts for Employers* — result in statistically significant gains in knowledge on the part of families, community organizations and employers. Ten community site visits are held to present the brochures, with separate meetings held for community organizations and employers. The brochures, groundbreaking in style and content, prove to be both enlightening and motivational.	1994-95

1994-95 In accordance with Southern Institute recommendations, North Carolina revises its state policy to require that the brochures be provided to and reviewed with welfare families at their six-month redetermination interviews, as well as to families applying for assistance for the first time. The final report is completed in December 1994.

1995-96 Children First in Buncombe County, North Carolina, contracts with the Southern Institute to provide technical assistance in developing a base of information on programs and services offered by governmental agencies for children under age six. An organizational assessment is designed to help identify areas where collaboration can reduce costs and/or enhance service delivery and address unmet needs. The assessment results in a March 1996 report presenting a preliminary analysis of organizational data and setting forth recommendations for Buncombe County.

1996 The North Carolina Department of Human Resources grants permission to the Southern Institute to replicate the three information outreach brochures in other states.

The Southern Institute begins an information outreach project in collaboration with the Georgia Division of Family and Children Services. Patterned after the North Carolina project, the initiative focuses on adapting the North Carolina brochures for Georgia use. Nine focus groups with families, community organizations and employers are held to test the original brochures. Once again, gains in knowledge are found to be statistically significant across all groups tested. A final report is completed in December 1996.

The states of Florida and Tennessee commission the Southern Institute to begin replication of the information outreach brochures for use in those states.

The Henry J. Kaiser Family Foundation awards a grant to the Southern Institute to produce a second report on *Uninsured Children in the South.* The report is published in November 1996.

1997 With funding from The Robert Wood Johnson Foundation and the Foundation for Child Development, the Southern Institute commences an exploration of policies and procedures related to health coverage, child care and other benefits affecting low-income families in the South. Site visits to 17 southern states and the District of Columbia, as well as additional research, culminate in a February 1998 report titled *Southern Regional Initiative to Improve Access to Benefits for Low-Income Families With Children.* With support from The Robert Wood Johnson Foundation, the Southern Institute information outreach brochures are presented during the site visits, and technical assistance to replicate the brochures is offered without cost to the states. States are responsible for printing and disseminating the brochures. Florida and Tennessee replicate the SICF information outreach brochures, and additional states begin the replication process.

The Southern Institute conducts the Southern Regional Forum on Improving Access to Benefits for Families with Children in December 1997. Representatives from 17 southern states and the District of Columbia attend, along with representatives of the federal government and national organizations.

Report Appendix

The Robert Wood Johnson Foundation names the Southern Institute to serve as National Program Office for a new program, *Covering Kids: A National Health Access Initiative for Low-Income, Uninsured Children.*	1997
The Southern Institute continues to serve as the National Program Office for *Covering Kids.* Due to overwhelming response from public and private organizations across the nation that submitted state applications for *Covering Kids*, The Robert Wood Johnson Foundation decides to expand the scope of and funding for *Covering Kids* from a $13 million, 15-state grant program to a $47 million grant program available to all 50 states and the District of Columbia. The Southern Institute schedules and conducts site visits for review teams to 49 states and the District of Columbia and administers proposal reviews by the National Advisory Committee.	1998
With continued funding for the Southern Regional Access to Benefits initiative from The Robert Wood Johnson Foundation, the Southern Institute conducts a regional meeting to discuss child health coverage verification issues. Medicaid and State Children's Health Insurance Program (SCHIP) officials from 15 southern states, as well as representatives from the Health Care Financing Administration, participate. The dialog results in the publication of a groundbreaking report providing interpretation of verification requirements, titled *The Burden of Proof: How Much is Too Much for Child Health Coverage?* (Extensive demand necessitates several printings.)	
The Southern Institute conducts two site visits to Mayersville, deep in the Mississippi Delta, during 1998 and 1999 to learn more about the challenges faced by children and families in economically depressed rural communities. Federal, state and local officials participate in the site visits. At a series of community meetings, the site visit team hears testimony from residents, including parents and grandparents. Families describe barriers to meeting the needs of their children, including a lack of jobs, a lack of health care and child care providers and a lack of transportation. The project, funded through The Robert Wood Johnson Foundation, culminates in a June 1999 report titled *Mayersville, Mississippi: A Study on Improving Access to Benefits and Services for Low-Income Families in the Rural South.*	1998-99
As of December 1998, 16 southern states had replicated the Southern Institute's *Leaving Welfare for Work Isn't As Scary As It Seems* brochure, 14 had replicated the *Have You Heard About Benefits for Working Families???* brochure, and 13 had replicated the *Facts for Employers* brochure.	
The Southern Institute continues to serve as the National Program Office for *Covering Kids.*	1999
The Robert Wood Johnson Foundation designates the Southern Institute to serve as the National Program Office for *Supporting Families After Welfare Reform: Access to Medicaid, SCHIP and Food Stamps*, a joint initiative of the Foundation, the U.S. Department of Health and Human Services and the U.S. Department of Agriculture. The $6.8 million initiative is designed to help states and large counties solve problems in eligibility processes that make it difficult for low-income families to access and retain Medicaid, SCHIP or Food Stamps, particularly families moving from welfare to work. Nine grants are awarded.	

Report Appendix

1999

The state of Louisiana replicates all three Southern Institute information outreach brochures.

Due to popular demand, the Southern Institute information outreach brochures are translated and published in Spanish.

2000

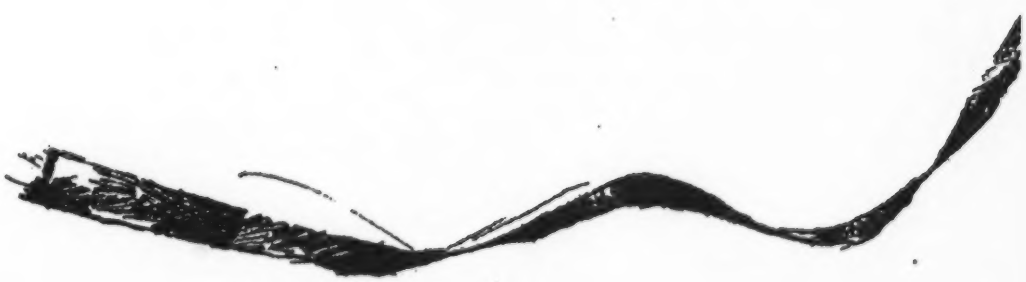
The Southern Institute continues to serve as the National Program Office for *Covering Kids.*

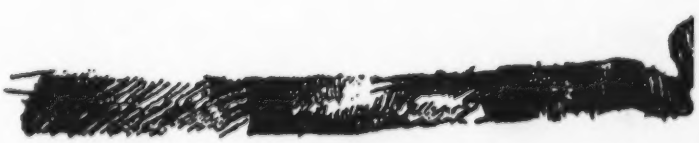
The Southern Institute continues to serve as the National Program Office for *Supporting Families After Welfare Reform.*

The Southern Institute receives a grant from The David and Lucile Packard Foundation to implement the Southern Regional Initiative on Child Care. A 23-member Southern Regional Task Force on Child Care is created, with representatives appointed by the governors of 16 southern states and the mayor of the District of Columbia, as well as by the Southern Institute and the Southern Growth Policies Board. Created to address issues related to the affordability and accessibility of child care assistance, the initiative's goals include increasing awareness, increasing access to child care assistance, achieving a coordinated, seamless system of child care assistance, simplifying the application and redetermination processes and improving outreach to eligible families.

The state of Louisiana updates and reprints the Southern Institute's *Have You Heard About Benefits for Working Families???* information outreach brochure.

The Southern Regional Task Force on Child Care releases a report titled *Sound Investments: Financial Support for Child Care Builds Workforce Capacity and Promotes School Readiness* at a District of Columbia news conference. The report features a comprehensive Action Plan with 10 Goals and 52 Action Steps, as well as data supporting the need for action. A news conference, held at the National Press Club, generates media coverage across the southern states and beyond. In total, the event garners more than 100 newspaper articles as well as television and radio coverage. TV coverage includes segments on NBC, ABC, CBS and FOX affiliates, as well as on CNN *Headline News.*





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